TESA A10 Inspector User Guide

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Introduction

How to use this guide

This user guide is designed to support you following your TESA training. The guide is broken down into clear sections so that you can pick out the functionality that you are interested in re-visiting, revising or reminding yourself of. The user guide can be used in conjunction with the online help within the TESA system.

About A10 Inspectors

This role will be performed by GO users, so they can schedule A10 visits and record findings for a project or an Action Plan that their region is managing.

The key operations performed by this role are:

- Schedule an A10 visit. The user confirms the date of a project visit and the system will alert the Applicant Project Manager.
- Prepare and print out documentation to be taken on the visit.
- Register the findings of an A10 visit on TESA.

Team Leader Role

An A10 user allocated a 'team leader' status on TESA can, in addition to the tasks above:

- Access a visit assigned or 'locked' under another A10 user and route it on to him or herself, or another A10 user for action.

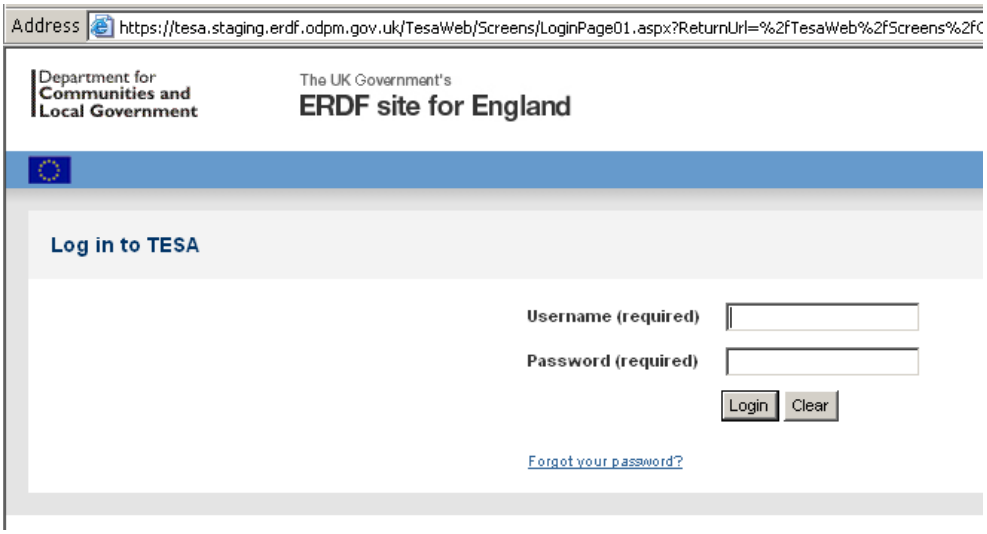
This feature of TESA ensures that if an A10 user is out of the office, on holiday or sick leave for example, any items locked to them can be 'released' and re-allocated to another member of staff where necessary.

Logging in and out of TESA

Login

To log in to TESA, go to the home page of the ERDF for England website - www.erdf.communities.gov.uk - and click on 'login'.

Note: The 'log-in' link is not yet available on the ERDF website. For early adopter office staff using the staging environment for Business Readiness Testing, please enter https://tesa.brt.erdf.odpm.gov.uk to display the login screen.



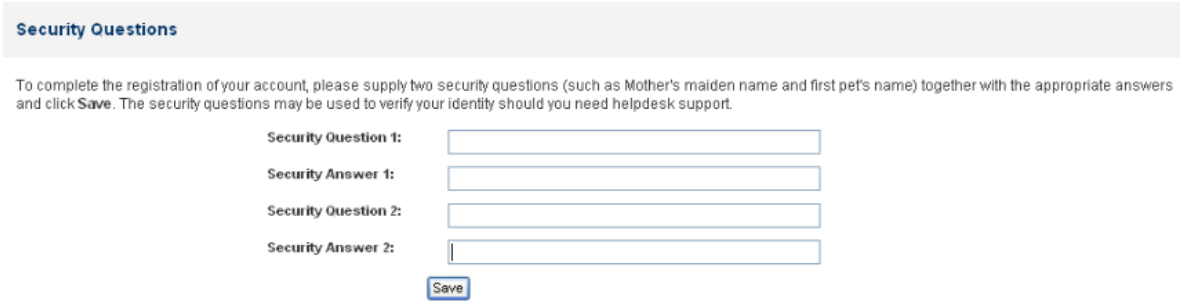
On the Login screen, to enter the system:

1. Enter your Government Gateway username and password.
2. Click on Login. Your home page will display.

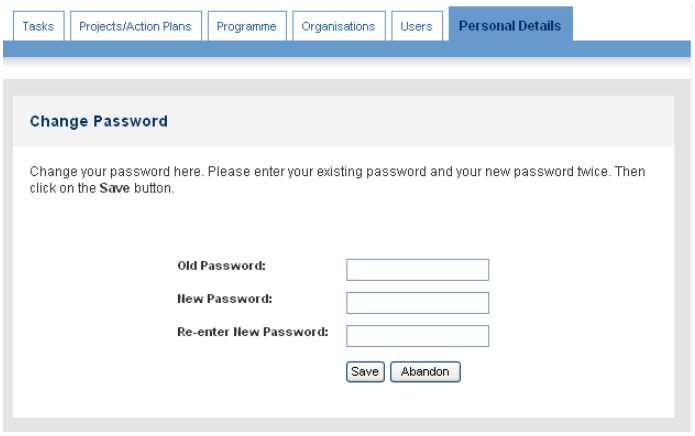
First time log-in

The first time you log-in as a new user, for security purposes you will be asked to change your password. You are also required to add two security questions and answers. These will be used to validate your identity if you should forget your password in the future.

Security questions


Security Questions
To complete the registration of your account, please supply two security questions (such as Mother's maiden name and first pet's name) together with the appropriate answers and click Save. The security questions may be used to verify your identity should you need helpdesk support.
Security Question 1:
Security Answer 1:
Security Question 2:
Security Answer 2:
Save

Change Password screen



Notes:

- Once you are logged-in, TESA will not generally request further proof of your identity. It is therefore essential that you do not share your ID and password with anyone.
- If you have not received a TESA ID and password prior to go-live contact your GO TESA helpdesk.
- For what to do if you forget or want to change your password please see the Introduction to TESA user guide.

Logout

Click on the Logout link in the top right navigation bar.

Home: Tasks

To display this screen

'Tasks' is always the first page that displays after you log in to TESA. To return to this page at any time during your TESA session click on the 'Home' link in the top right navigation bar.

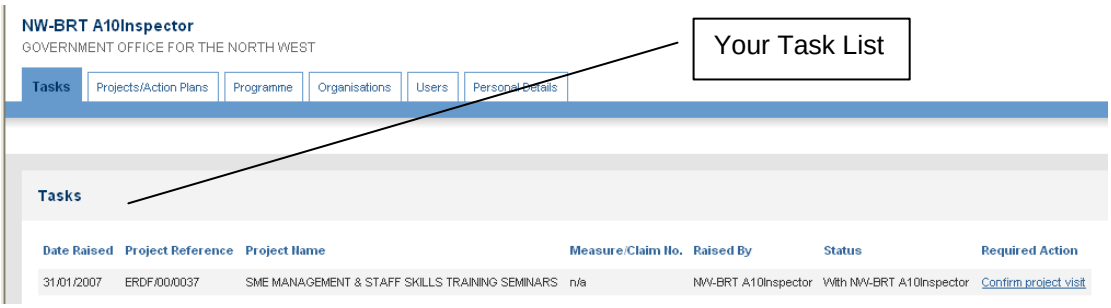
About this screen

'Tasks' is your main 'hub' on TESA. Your Task List displays all tasks relevant to the role or roles that you have been allocated. For the purpose of this guide we will focus only on tasks relevant to the A10 role.

Tasks can be either open or locked:

Task Status	Description
Open	Anyone with the appropriate TESA role can take up and complete. To pick up an open task click on the link in the Action column.
Locked	Only the named user can take up and complete. The status will contain the name of the user who currently owns the task.

All visits that require confirmation and those which are currently being worked on by other A10 users will be shown.

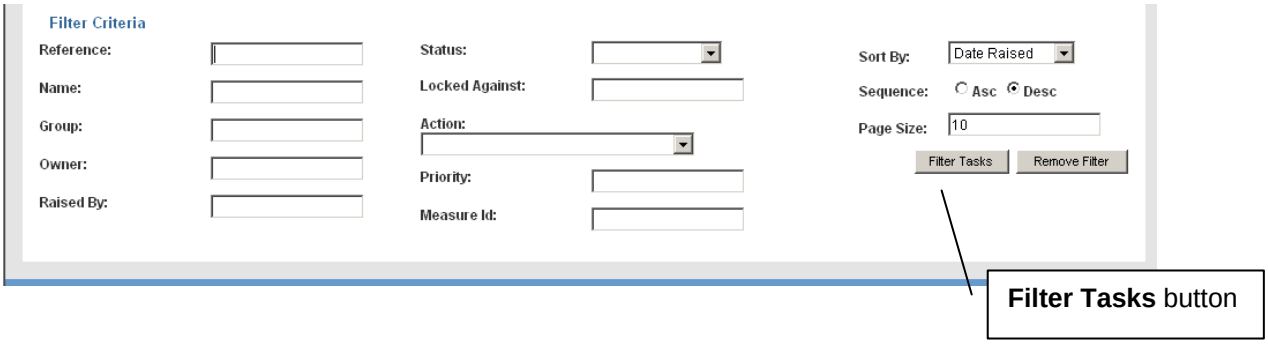


Filtering Projects

A range of filter criteria are provided to help you prioritise your Task List.

1. To filter tasks, enter as many or as few criteria as you require and click on the **Filter Tasks** button.

2. To remove all selections and display all tasks, click on the **Remove Filter** button.

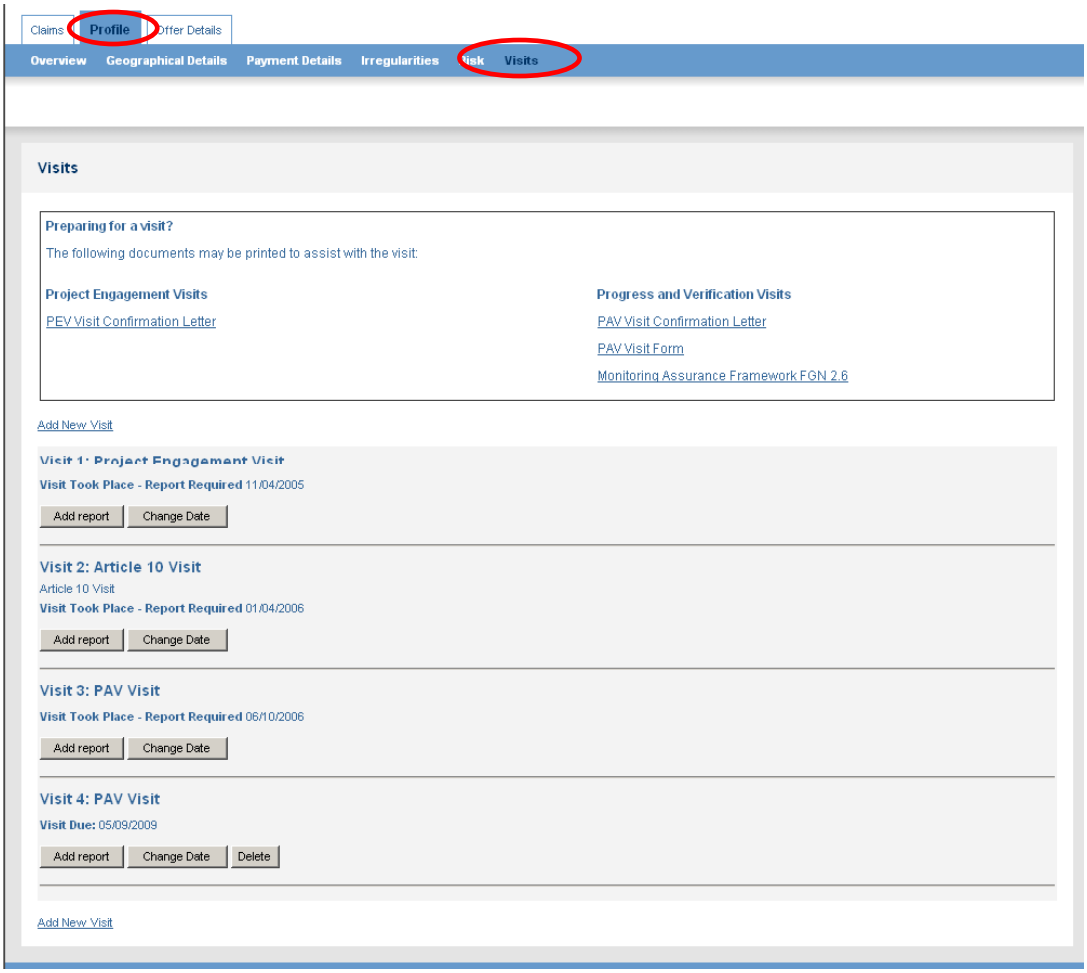


Field	Description
Reference	Enter the project or Action Plan reference to display only tasks relating to that project/Action Plan.
Name	Enter the project or Action Plan name to display only tasks relating to that project/Action Plan.
Group	Groups are categories set up by the GO at programme level for workflow and reporting purposes. Groups may be, for example, thematic - eg urban regeneration - or geographic - eg sub-regions. Enter a group name to display only tasks associated with projects or Action Plans belonging to that group.
Owner	Each project or Action Plan on TESA is 'owned' by a Project Monitor within the GO. To filter tasks by an owner enter their name here. This can be your own, or another user's name.
Raised By	If you wish only to view tasks raised by a specific person on TESA, enter their name here.

Field	Description
Status	Click in this field to display different task statuses by which you can then filter your list.
Locked Against	If you wish only to view tasks locked against a specific person on TESA, enter their name here. This may be you, or another user.
Action	Click in the field to display a list of actions – for example Certify Claim - which you can then select from and filter by.
Priority	If you wish only to view tasks which relate to a specific programme priority, enter the priority ID here.
Measure ID	Enter a Measure ID (numeric) to display only tasks relating to that measure.
Sort By	Click in the field to display and select from a list of options to sort your tasks. You may sort by any of the Task List column headings. The default setting is 'Date Raised'.
Sequence	Results will display in descending order. If you wish to view results in an ascending order, click the 'Asc' radio button.
Page Size	Click in this field and enter the number of results you would like to appear on each page. The default setting is 10.

View the Visit Schedule

1. Search for and open the project/action plan you would like to view the visit schedule for.
2. Click on the Action Plan/Project Name link to open it. The Project Profile Overview screen will display.
3. Click on the Visits tab as highlighted below.



About this screen

The Visits screen displays all visits recorded against the project/action plan on TESA, in chronological order. A number of visit types may appear:

- PAV (previously referred to as Article 4)
- Article 10
- Project Engagement

- Other.

Each visit type can display in the schedule in a number of formats:

- **Visit Scheduled - Confirmation Required**. These are loosely scheduled but not yet confirmed appointments. These visits will appear with only a month and year indicated.
- **Visit Due**. These are confirmed appointments: the day, month and year when the visit is scheduled to take place will be shown.
- **Visit Took Place - Report Required**. These are visits that have taken place, but have not yet had a visit report completed/attached on TESA.
- **Visit Complete**. These are historic visits, which have findings attached. These visits can not be edited.

Buttons

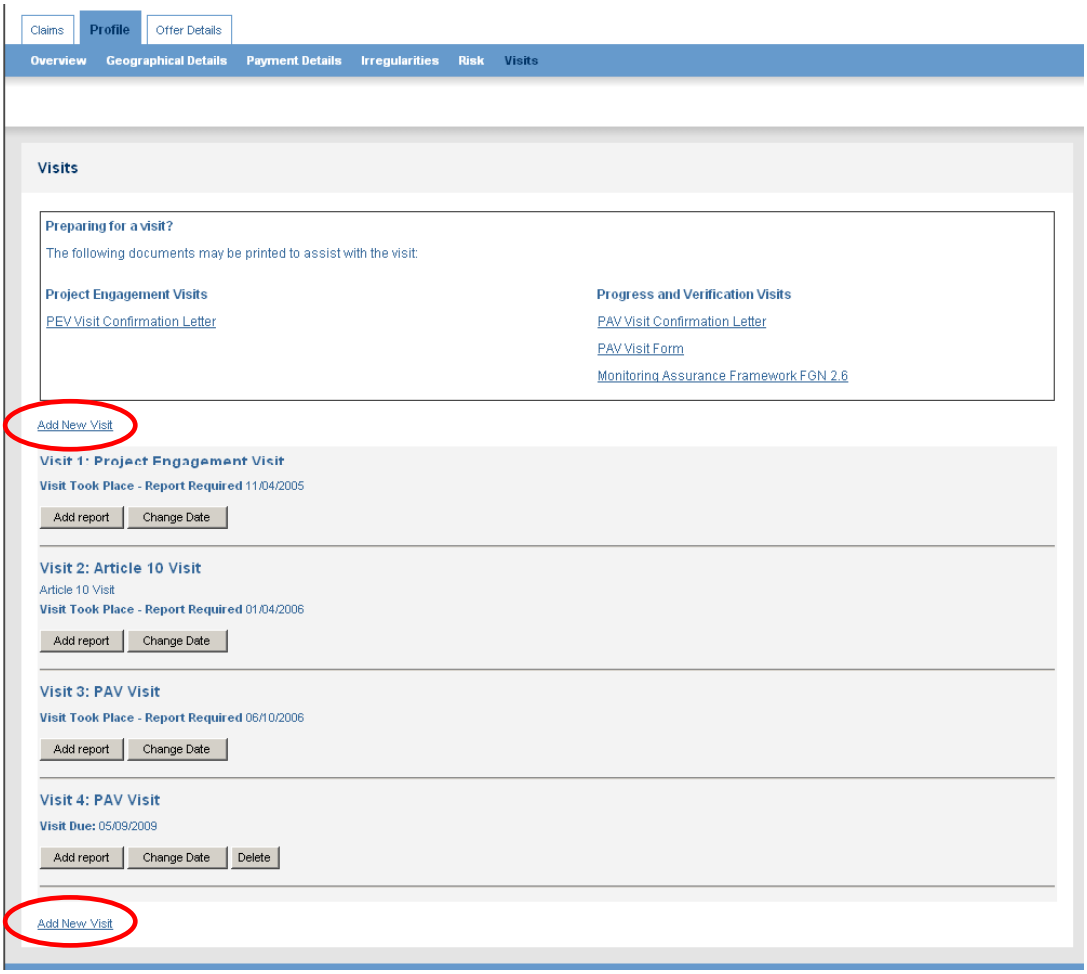
The table below explains the function of the buttons and links that display on this screen.

Button	Description
Add New Visit	Click on this link to add a visit to the schedule. The Add Visit screen will display.
Change Date	This button displays once a visit has been created and saved on TESA. Click on the **Change Date** button if you need to change the date of a confirmed visit, or if you want to add a confirmed date for a scheduled visit.
Delete	The **Delete** button displays once a visit has been created and saved. You may delete a visit from TESA at any point until a report has been added.
Update Schedule	This button displays when you have only loosely scheduled a visit, or when you have clicked on the **Change Date** button to amend the date of a confirmed visit. Once you have amended the visit date, click on the **Update Schedule** button and the visit schedule will reorder if necessary into chronological order.

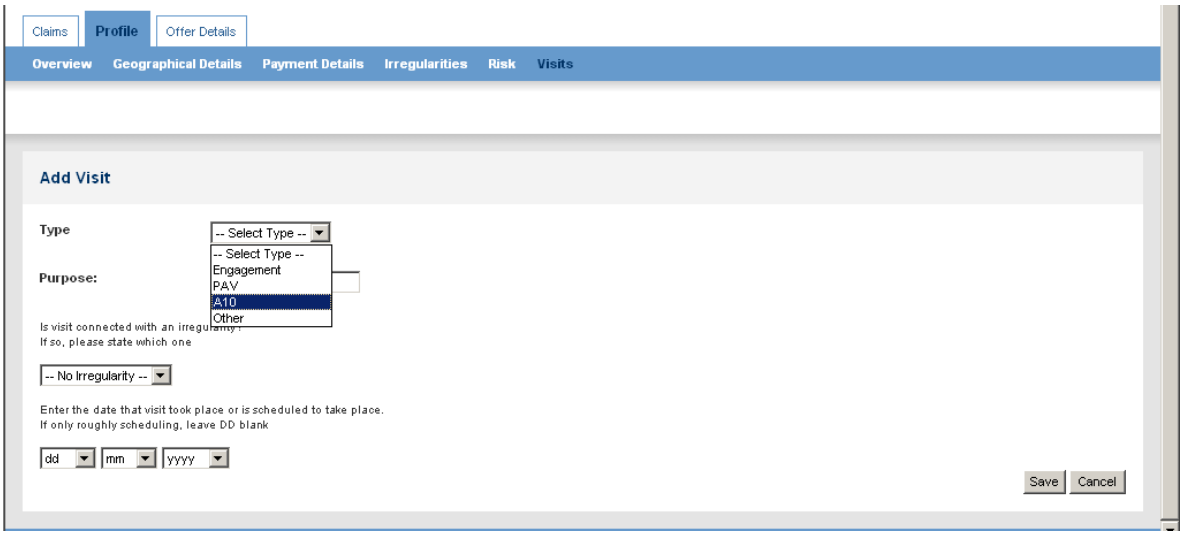
	Click on this button to enter a Visit Report on TESA. The Inspection Report screen will open.
	Click on this button to open a Visit Report entered on TESA.

Schedule a Visit

1. On the Visits screen, click on one of the two Add New Visit links.



2. The Add Visit screen displays. Click in the Type field and select a visit type from the dropdown list displayed. You are presented with four options but you will invariably select 'A10' or 'Other'. Engagement and PAV are visit types used by the Visitor role, allocated to GO users in the ERDF team.



Visit Option	Description
A10	A minimum of 5% of eligible expenditure of each programme must be examined by the A10 team. These inspections verify the effectiveness of the management and control systems in place, and selectively on the basis of risk analysis, expenditure declarations made.
Other	Use this option for all other types of visits, such as a visit taking place as the result of an irregularity.

Note: Should the GO require additional visit types adding to the dropdown list, this should be requested through the TESA central support service.

3. Click in the Purpose field and enter a brief summary of the visit purpose.

4. If the visit is associated with an irregularity, select the appropriate irregularity record from the drop down list.

Note: Only irregularities recorded on TESA against the project or Action Plan will display in the list. If no irregularities have been entered, the only option which will display is 'No Irregularity'. If the irregularity you are looking for is not shown please talk to the Project Monitor who 'owns' the project or action plan within your GO.

5. If the visit has been confirmed with the Applicant, select the day, month and year by clicking in each of the fields and selecting from the dropdown list displayed.

OR

If you are loosely scheduling a future visit, enter just the month and the year. A notification will appear in your Task List with a required action of 'Confirm Project Visit'. Once the visit date has been agreed with the Applicant, you should click on this link to open the Visits screen and confirm the visit date (see Change or Confirm a Visit Date section below).

6. Click on the Save button.

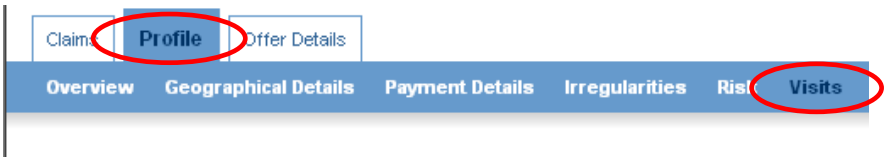
7. Alternatively, to cancel your entry, click on the Cancel button.

8. Once you have clicked **Save**, the Visits screen displays with the visit entered on the schedule.

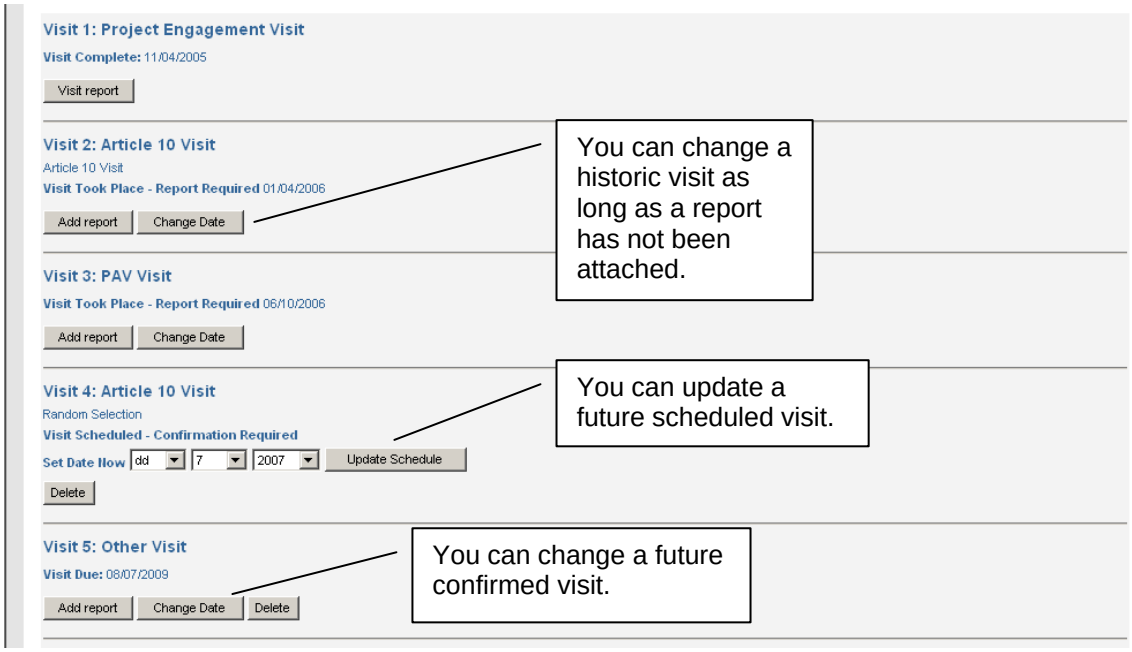
Change or confirm a visit date

1. If necessary, search for and open the project/action plan you wish to amend a visit for. The Project Profile Overview screen displays.

2. Click on the Visits tab. The Visits screen displays.



3. To change the date of a confirmed or historic visit, click on the **Change Date** button.



4. The date fields will display in edit format. Amend the date as required. For your reference the original visit date will display in the date fields.

5. Click on the **Update Schedule** button.

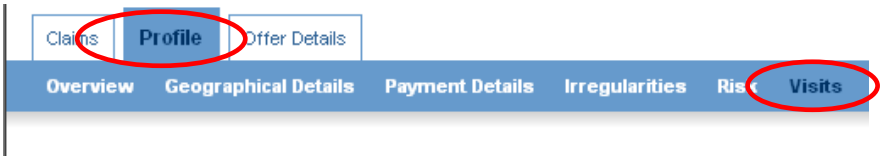
6. To confirm a loosely scheduled visit, click in to the date fields and enter the agreed visit date.

7. Click on the **Update Schedule** button.

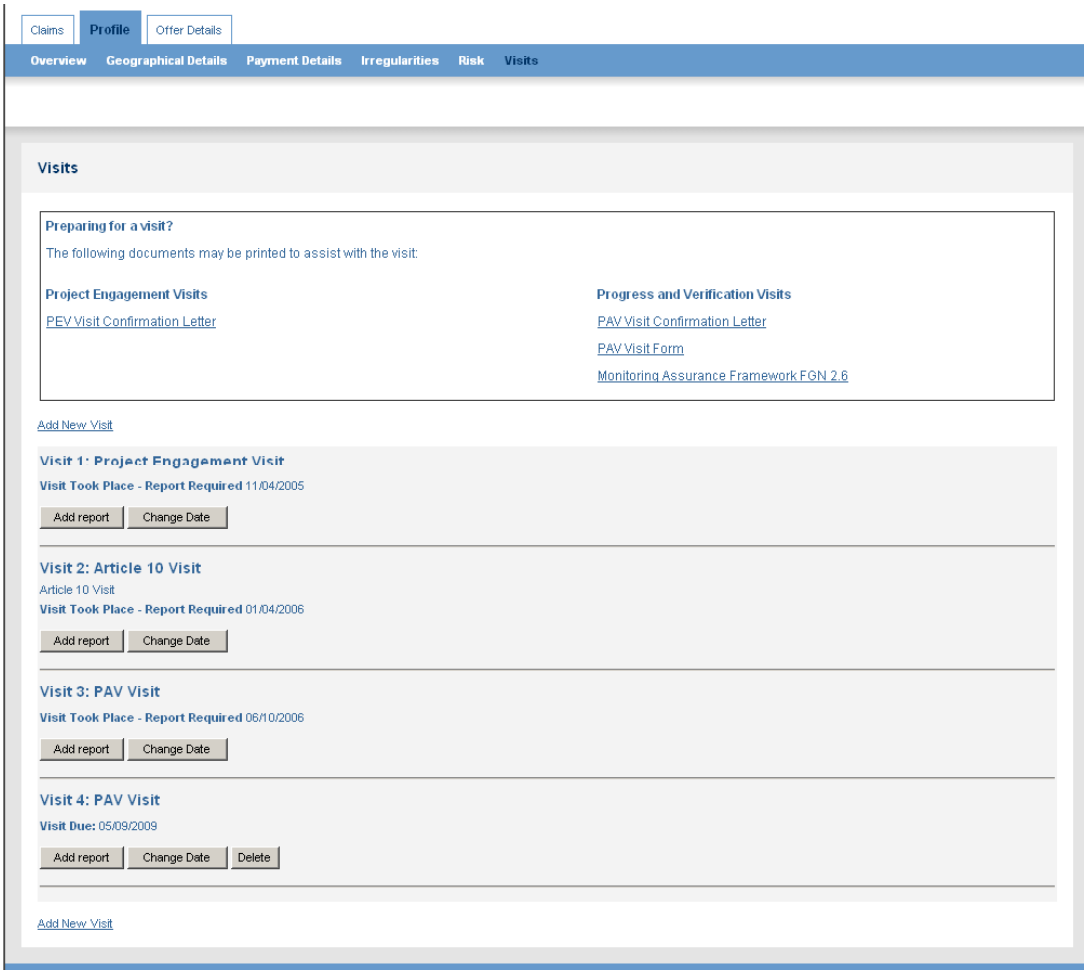
8. The visit schedule will reorder if necessary to display visits in chronological order.

Delete a visit

1. If necessary, search for and open the project/action planyou wish to amend a visit for. The Profile Overview screen displays.



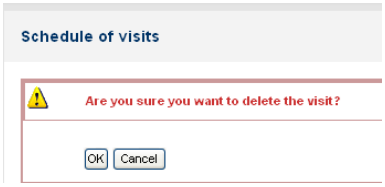
2. Click on the Visits tab. The Visits screen displays.



Note: It is possible to delete future confirmed or loosely scheduled visits. It is not possible to delete historic visits.

1. Click on the **Delete Visit** button.

2. Click on **OK** to confirm your action. The visit is deleted.

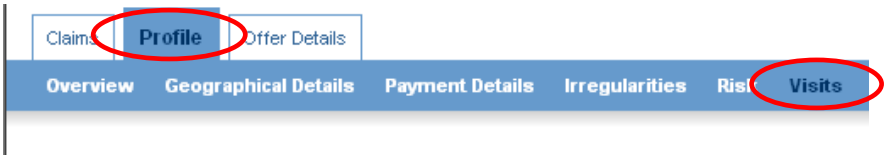


Add or Edit a Visit Report

Enter a Visit Report

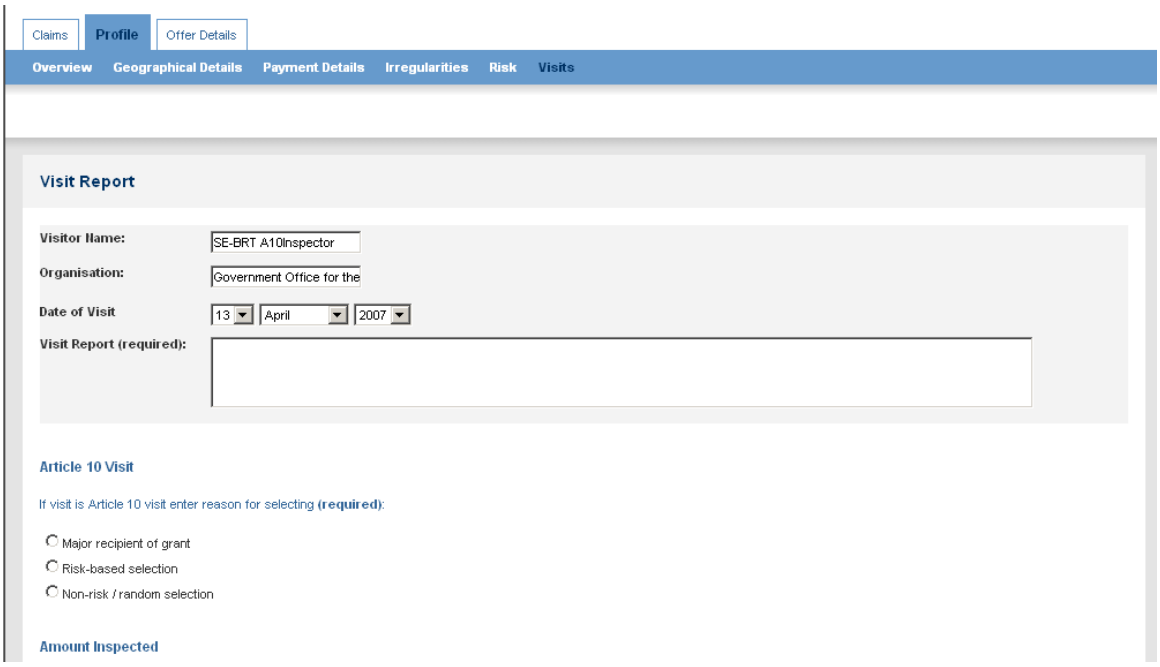
Once a visit has been completed, a visit report should be completed.

1. If necessary, search for and open the project or action plan you wish to add a visit for. The Profile Overview screen displays.

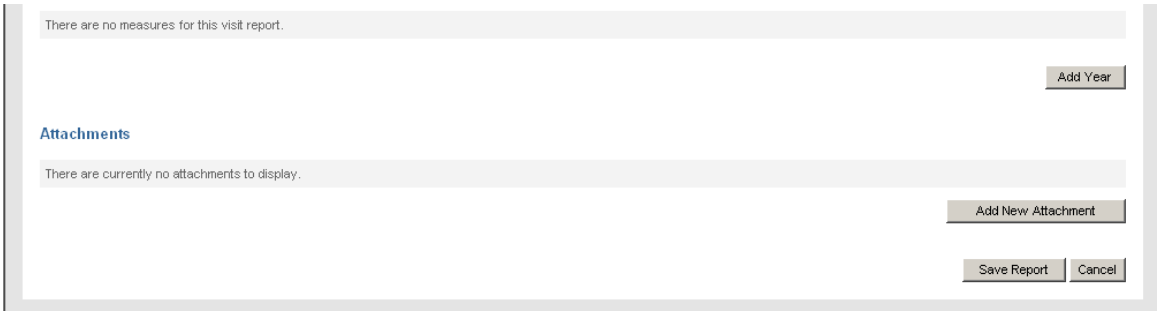


2. Click on the **Add Report** button next to the relevant visit.

3. The Visit Report screen displays.



The remainder of the screen is on the next page.



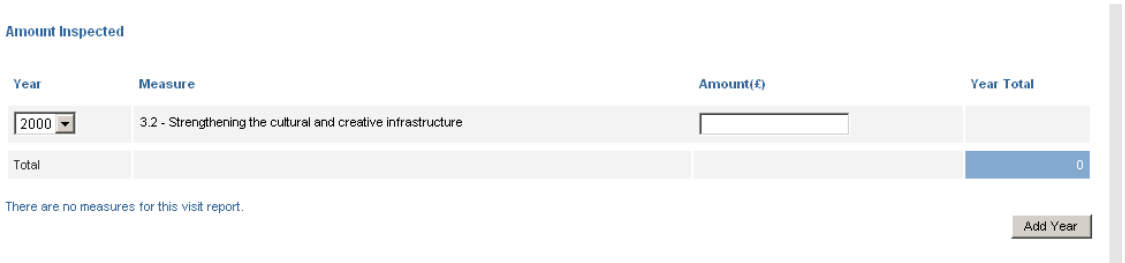
4. The Visitor's Name and Organisation fields will display your details. If you are adding the visit report on behalf of someone else, click in each field and enter the correct contact information.

5. The visit date fields will display the current date. Click in each field and select the date the visit took place.

6. You can enter your report in two ways: directly into the Visit Report box, or as an attachment. Please remember however that as the Visit Report field is mandatory so you must enter something in this field to allow you to save the page. (You may wish to enter a summary of the report or simply a reference to the attached report).

7. Choose from the three options presented in the 'Reason for selecting the project/action plan' field by clicking on the appropriate radio button.

8. To enter the amount (£) of expenditure inspected during the visit, click on the **Add Year** button. A table (shown below) displays to allow you to enter data.



9. Click in the Year field and select from it the year during which the expenditure you inspected was defrayed.

10. If the project or action plan that was inspected is multi-measure, click in the measure field and select the appropriate measure, for which the expenditure was inspected, from the dropdown list.

11. Enter the value of expenditure inspected for that year/measure in the 'Amount' field.

12. To add a further year click on the **Add Year** button and repeat steps 9-11. Repeat as necessary.

13. To upload a file, click on the **Add New Attachment** button, then:

    a. Click on the **Browse** button.
    b. Navigate to where the attachment is stored.
    c. Select the item to attach.
    d. Enter a title for the attachment in the Title field.
    e. A description may be entered if required.
    f. Click on the **Upload Attachment** button.
    g. Use the **Abandon Upload** button if you have chosen the wrong item to attach. Select the correct item and then repeat the steps above.

14. Click on the **Save Report** button.

15. The screen re-displays with report details and attachments displayed.

16. Click on the Visits tab to display the visit schedule. You will see the visit now displays with a Visit Report button. All users with access to the Visits tab can click on this button to view the report.

Edit a Visit Report

It is possible to edit a visit report after it has been completed. It is also possible to add or remove attachments.

1. If necessary, navigate to the Visits screen using the steps outlined above.

2. Click on the appropriate **Visit Report** button. The Visit Report screen will display.

3. Click on the **Edit Report** button. The form will become editable.

4. Amend the information displayed as required.

5. Using the **Add New Attachment** or **Delete** buttons to add a new, or remove an existing attachment.

6. Click on the **Save Report** button once the changes are complete.